

## **JOB DESCRIPTION AND PERFORMANCE EVALUATION**

**Job Title:** Medical Assistant  
**Status:** Non-Exempt  
**Employee Name:**  
**Evaluation Date:**  
**Evaluation Period:**  
**Evaluation Type:** \_\_\_\_\_ **Orientation Period** \_\_\_\_\_ **Training** \_\_\_\_\_ **Annual**

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### **EVALUATION GRADING**

- 1 = **Unacceptable Performance:** Work does not meet minimum requirement standards. Significant improvement needed.
  - 2 = **Below Standards:** Inconsistently meets standards. Improvement needed. Requires more than normal supervisory direction and follow-up.
  - 3 = **Meets Job Standards:** Work demonstrated consistently meets standards.
  - 4 = **Above Standards:** Work demonstrated frequently exceeds standards.
  - 5 = **Outstanding Performance:** Work demonstrated is an exceptional performance of standards.
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### **GENERAL SUMMARY**

Employees are hired with an expectation to help carry out the vision of overall health and wellness of Piedmont Internal Medicine, PC's patients and community. Employees are expected to exhibit a continuous behavior of professionalism, which includes but is not limited to, treating customers and co-workers with respect and dignity, aligning behavior with customer service principles, maintaining customer and patient confidentiality, abiding by employee guidelines for professional behavior, appearance, and communication, exhibiting teamwork behaviors, being effective in conflict resolution, helping others to understand issues and accept changes, demonstrating high standards of work performance and flexibility, maintaining positive interdepartmental relationships, keeping a positive attitude, and adhering to the policies and procedures of the organization.

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### **JOB SUMMARY**

The Certified Medical Assistant works under the direct supervision of the physician, mid-level licensed provider, back office supervisor, and practice manager, and in cooperation with other office staff in assisting with safe and effective patient care in compliance with established standards and protocols of Piedmont Internal Medicine, PC's goals and objectives.

Responsible for routine back office functions including the maintenance of patient flow, exam room preparation and turnover, bringing patients back to exam room, taking and recording basic medical history, and assisting the physicians and/or nurse as needed.

Responsible for retrieving, routing, and assisting with provider/nurse messages regarding patient telephone calls, messages, and call backs; appointment scheduling; and prescription refills as directed by the physician and/or provider.

Additional responsibilities include clinical compliance in sterilization techniques, sample medication oversight and compliance, OSHA requirements, and any other compliance standards required within the clinical realm of the practice.

Use of Computers, telephone, fax machine, copier, stethoscope, EKG machine, pulse oximeter, oxygen devices, wheelchairs, stretchers, scales, glucose monitor, and other patient care equipment necessary to perform required duties as appropriate to the scope of the practice.

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**POSITION REPORTS TO:** Back Office Coordinator/Physician/Office Manager/Practice Administrator

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## JOB QUALIFICATIONS

**Required Education:** High School Diploma or General Education (GED)  
Graduation from an accredited Medical Assistant program; or completion of a Nursing Assistant program.

**Preferred Education:** Certification as medical assistant preferred through CMS recognized certification organization such the American Association of Medical Assistants (AAMA); American Medical Technologists (AMT); Medical Assistant Certification from the Commission on Accreditation of Allied Health Education Programs (CAAHEP); or the Accreditation Bureau of Health Education Schools (ABHES); BLS/CPR certification is required or obtained within first three (3) months of employment.

**Experience:** Minimum of one (1) year of Primary Care Experience. Candidates who have performed an externship in a private practice setting may be considered.

**Skills:** **Language :** Ability to read and comprehend simple instructions, short correspondence, and memos. Ability to write simple correspondence. Ability to effectively present information in one- on- one and small group situations to customers, clients, physicians, and other employees of the organization.

**Mathematical Skills:** Ability to add, subtract, multiply and divide in all units of measure, using whole numbers, common fractions, and decimals.

**Reasoning Ability:** Ability to apply common sense understanding to carry out detailed but uninvolved written or oral instructions. Ability to deal with problems involving a few concrete variables in standardized situations.

**Computer:** Previous exposure to electronic patient management systems. Ability to acquire working knowledge of EPIC EMR and Scheduling software. Ability to operated Windows 7 Operating System, Microsoft Outlook, Word, and Excel.

**Medical Equipment:** Ability to use/operate stethoscope, EKG machine, pulse oximeter, oxygen devices, wheelchairs, stretchers, scales, glucose monitor, blood pressure, and other patient care equipment necessary to perform required duties as appropriate to the scope of the practice.

**Other Equipment:** Ability to use telephone, fax machine, scanner, copier, and other similar equipment typically used in a physician office setting.

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## WORKING ENVIRONMENT

### 1 **PHYSICAL DEMANDS:** *See attached Physical and Mental Requirements Sheet for details.*

#### **Additional Physical Demands are:**

- Ability to grasp with both hands; pinch with thumb and forefinger; turn with hand/arm; reach for (above shoulder height).
- Ability to simultaneously operate clinical equipment and read gauges.
- Ability to simultaneously speak on the telephone and write.
- Ability to hold delicate instruments in a steady and firm manner.

### 2 **VISUAL, HEARING, DEXTERITY, AND MENTAL DEMANDS:**

**Vision:** Adequate to perform the essential functions of the job such as identifying brachial vein for venipuncture; reading instrument gauges.

**Hearing:** Adequate to perform the essential functions of the job such as listening for circulatory functions through stethoscope.

**Speaking:** Adequate to perform the essential functions of the job such as providing patient education regarding treatment plans/regimens.

**Dexterity:** Adequate to perform the essential functions of the job such as dressing changes; venipuncture.

**Mental Demands:** Adequate to perform the essential functions of the job such as recording accurate patient histories and assisting with exams while coordinating other services.

### 3 **WORKING CONDITIONS:**

- Position requires individual to be dressed in uniform 100% of time; 75% of time individual will be required to wear protective equipment including rubber gloves, face mask, goggles and/or surgical gown.
- Position will require frequent exposure to blood and body fluids. Appropriate protective equipment will be provided.
- Exposure to hazardous materials will be frequent. These materials are primarily laboratory reagents and cleaning and disinfecting solutions.
- The Exposure Control and Hazard Communication plans of the practice detail all these materials and the situations when exposure to blood and bodily fluids are likely to occur.
- Employee must be current with all vaccinations including Hepatitis B.

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## PRINCIPAL DUTIES AND JOB RESPONSIBILITIES

1. Places the patients in the examining room ensuring they are as comfortable as possible.
2. Performs EHR intake entry by going over medication lists, allergies, and other pertinent information required by the provider. Obtains vital signs, secures complaint, and enters the information into patient's electronic medical record. Follows current Meaningful Use regulations regarding "Computerized Order Procedure Entry".
3. Assists Physicians/Providers with examination and treatment of patient and is always accessible to them.

4. Assists physicians and/or PA/CNP in office surgeries using appropriate sterile procedure guidelines to ensure non-contamination of sterile field. Sets up procedure equipment and/or appropriate procedure/surgical instrument tray.
5. Performs phlebotomy and laboratory tests as required by the physicians or physician assistants and in accordance to state and federal regulations, including CLIA. Routinely reviews all policies and procedures regarding CLIA Waived testing. Passes all quality assurance protocols as directed by the CLIA, via the assigned Lab Director for the clinic in coordination with hospital lab services and quality control requirements.
6. Screens telephone calls for the Physicians/Providers. Takes accurate clinical messages within the limits of her knowledge and practice policy. May answer routine patient inquiries with respect to medical questions within the limits of knowledge, as directed by Physician/Provider, and clinic policy.
7. Performs triage duties according to practice protocols and as scheduled by the Clinical Supervisor.
8. Ensures that all equipment in exam room is clean and properly set up prior to each patient encounter.
9. Properly pre-cleans, contains, and prepares non-disposable instruments for transport to central sterilization. Keeps appropriate logs to track instruments sent to and received back from central sterilization.
10. Appropriately stores sterilized instruments. Monitors expiration dates on sealed sterile instruments.
11. Cleans and restocks examining rooms for the day's use.
12. Ensures that reports from diagnostic tests ordered have been received and have been entered in the patient's chart directly through electronic transfer or scanned to the appropriate location, digitally.
13. Prepares all diagnostic reports for availability to physicians. Ensures they have been scanned or uploaded into EHR system.
14. Takes medication and prescription questions and refill calls patients and pharmacists. Calls in prescriptions and prescription refills accurately to pharmacy as directed by the provider and documents accurately in the medical record. Utilizes Medication Reconciliation tools within EHR in compliance with current Meaningful Use guidelines.
15. Ensures and/or obtains insurance required prior authorizations for medication. Communicates insurance prescription requirement changes to Physician/Provider and/or patient as necessary.
16. Understands concept of insurance prescription formulary requirements and keeps up to date with changes as communicated and/or directed by Physician/Providers, Office Coordinator, Practice Manager, and Clinic Management.
17. Returns patient calls with provider directed instructions, and documents patient's chart accordingly.
18. Assists in maintaining all clinical equipment to include sterilizing, if applicable. Evaluates all equipment for damage and immediately reports to direct supervisor.
19. Ensures patients have proper pre-operative and post-operative instructions and follows up with patients. Reports back to physician status of patient and documents in patient record.
20. Coordinates physician(s) office schedule with front office to ensure physician patient time is being used efficiently.
21. Communicates with front office staff regarding working patients into the provider(s) daily schedule.

22. Keeps hazardous material data sheets up to date and logs all required information in file as required by law.
23. Maintains and communicates to supervisor, inventory of all medical supplies and orders supplies as necessary.
24. Checks all expiration dates and properly disposes of all expired medication.
25. Performs monthly check and inventory of crash cart supplies and properly logs information into file. Disposes of and replaces any crash cart medication.
26. Schedules outside diagnostic tests for patients and coordinates with the surgery schedulers as needed. Logs and maintains diagnostic scheduling logs.
27. Obtains insurance referrals authorizations and precertification numbers as determined by insurance for medications, office procedures, diagnostic procedures, surgical procedures, and/or as required.
28. May be required to float to other practices as requested by Management.
29. Relieves other staff members as indicated for scheduled and unscheduled breaks.
30. Prepares and administers medication/immunizations injections as directed by provider. This includes adhering to all regulations and guidelines for appropriate storage, mixing, disposal (expired medication), inventory, and labeling of medications; single and multidose vials per practice compliance guidelines.
31. Testing, recording, and providing education to INR patients as directed by supervising physician/provider. Includes documented into patient electronic health record. Alerts physician/provider immediately of abnormal and/or out of range results.
32. Assists patients and providers in completing various types of medical necessity documentation to include Advanced Beneficiary Notices (ABN), FMLA paper work, disability, social security administration (health related), work excuses, assistance prescription drug programs, and any other type of paperwork in which a physician/provider is required to disclose and/or attest to. Must ensure all HIPAA/HIE policies and procedures are followed.
33. All other duties as assigned by supervisor and/or provider.

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## **PRACTICE SUPPORT AND CONDUCT**

1. Establishes and maintains courteous, tactful and professional level of interpersonal skills necessary to deal effectively with:
  - Patients
  - Guests
  - Medical staff
  - The public
  - Co-workers
  - External business associates
  - Exhibits positive practice values in all interpersonal contacts
2. Demonstrates effective communication skills; ability to report and convey required information verbally or in writing; maintains required level of confidentiality; consults with and/or advises appropriate personnel of situations requiring follow-up or attention.
3. Conforms to Piedmont Internal Medicine, PC's organizational and departmental policies and procedures including but not limited to:
  - Mission & Values
  - Corporate Compliance

- Confidentiality Agreement
  - Rules of Conduct as outlines in the “Guidelines for Employees” handbook
  - Dress Code (personal hygiene)
4. Establishes and maintains a history of regular attendance; makes appropriate use of PTO and observes department call-in procedures for absence; establishes and maintains punctual work habits. Exhibits timely arrival and departure and dependable time habits including meal and other breaks.
  5. Attends/participates in mandatory facility-wide and department training/meetings as required (including but not limited to annual education, safety training, etc.). Ability to demonstrate and apply knowledge of fire, safety, security and disaster procedure regulations as presented in policies and procedures, outlined in safety manual, and as pertains to each work area.
  6. Supports departmental and organizational Mission through:
    - Appropriate use of resources – conserving equipment, supplies and personal time, and personal calls
    - Assists team members when needed
    - Accepting work or schedule assignments
    - Participating in performance improvement process as required

**INITIATIVE AND JUDGEMENT:** The Medical Assistant is to be considered the technical expert in all areas. Individual will be required to work alone without supervision. Legal consequences of error have the potential to be large and lengthy due to the nature of the responsibilities. Individuals must be able to make emergency, independent decisions about patient care issues. Will be responsible for the development of policy and procedures for all areas responsible.

**RESPONSIBILITY FOR CONTACT WITH OTHERS:** The Certified Medical Assistant has continual contact with patients, family members, physicians and other departments. Ordinary courtesy is adequate but may encounter situations where special tact is required.

**RESPONSIBILITY FOR LEGAL COMPLIANCE AND CONFIDENTIAL INFORMATION:** Confidential patient information is used routinely throughout the day. This position requires knowledge of and compliance with corporate compliance, OSHA, HIPAA, local, state, and federal laws, The Piedmont Clinic (as it pertains to membership), Community Connect (as it pertains to EPIC), and requirements as they relate to your responsibilities, department, and Piedmont Internal Medicine.

**RESPONSIBILITY FOR USE OF RESOURCES:** This position requires frequent use of resources of moderate value. Appropriate use of resources is expected – conserving equipment, supplies and personal time, and personal calls.

**JOB DESCRIPTION SUMMARY STATEMENTS:** This job description is intended to only describe the general nature and level of work done by people assigned to this job. It is not intended to provide an exhaustive list of duties, or requirements. All employees are expected to follow the direction of their supervisors.

I have read and understand the above job description:

*This position description reflects the general duties and responsibilities necessary to describe the principal functions of the job, as identified, and shall not be considered an exhaustive list of job responsibilities which may be inherent in the job, nor as a contract of employment. To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed are representative of the knowledge, skill, and/or ability required. The responsibilities listed may be subject to change at any time and individuals may be asked to perform duties outside of their regular responsibilities to support the ongoing operations of Piedmont Internal Medicine, PC.*

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Date

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Employee Signature

**I have reviewed this job description in detail with the above-signed employee:**

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Date

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Supervisor/Manager Signature